



CREATIVE DELIVERY

Client performance reporting template

A reporting structure that connects metrics to goals, explains what changed, names limits, and turns the report into a useful next conversation.

A practical worksheet from Stelaah

Use it, adapt it, and save it with the client work it supports.

HOW TO USE THIS

You need a client report that does more than list numbers.

WORK THROUGH THE CHECKLIST

- ☐ 01 **Restate the goal**

- ☐ 02 **Choose meaningful metrics**

- ☐ 03 **Explain changes**

- ☐ 04 **Name data limits**

- ☐ 05 **Recommend next actions**

- ☐ 06 **Agree the next review date**

Before you close this

Name one owner, one next action, and one date. A worksheet only helps when the next commitment is visible to the people doing the work.

Notes and decisions

Use this page to record what changes after you work through the checklist.

This practical workflow resource is not legal, financial, tax, or security advice. Adapt it to your team and circumstances.